



CRESTWOOD ADVISORS IS AN INDEPENDENT WEALTH MANAGEMENT FIRM. OUR COMPREHENSIVE FINANCIAL PLANNING AND INVESTMENT STRATEGIES ARE TAILORED TO EACH CLIENT'S UNIQUE GOALS AND VALUES SO THEY CAN MOVE FORWARD WITH CONFIDENCE AND CLARITY.

WHAT WE DO

Crestwood helps high-achieving families and professionals navigate complex financial situations, ensuring their hard-earned success translates into enduring wealth.

Our comprehensive approach allows us to customize solutions across all facets of wealth.

Today, we manage over \$8.02 Billion for clients nationwide.*

AREAS OF SPECIALIZATION

Concentrated Wealth

Diversifying Highly Appreciated Assets, Managing Risk and Taxes

- Direct indexing/tax loss-harvesting
- Long/short extensions
- Options strategies
- Gifting strategies

Customized Portfolios

Clients Work Directly with a Portfolio Manager Who Delivers:

- A research-driven allocation framework
- Individual stocks, bonds, ETFs, and mutual funds
- Access to select private market investments
- Tax-managed solutions

Comprehensive Financial Planning

Transforming Complexity into Clarity, Providing Confidence in Every Step

- Tax planning
- Trust and estate strategy
- Equity compensation
- Business succession planning and more

* All numbers reflect Crestwood Advisors' most recent ADV filing with the SEC

WHY PARTNER WITH CRESTWOOD

Capabilities

We specialize in addressing complex wealth challenges with innovative, actionable strategies.

Collaboration

Through proactive communication, we forge strong partnerships with our clients and their families to ensure seamless execution.

Impact

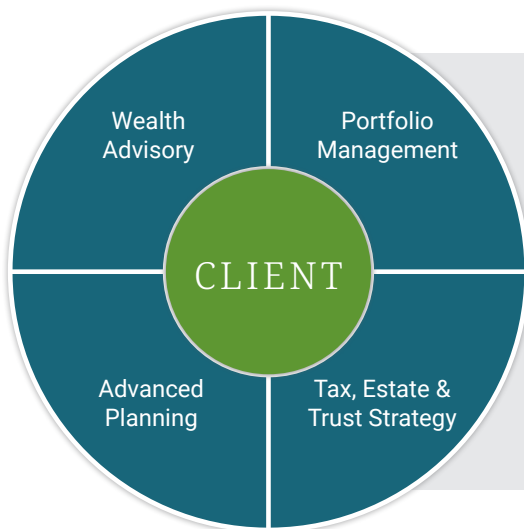
We tailor solutions that empower clients to achieve long-term financial success and peace of mind.

TIERED FEE SCHEDULE

Value of Assets	Annual Fee Rate
First \$3,000,000	1.00%
Next \$2,000,000	0.75%
Above \$5,000,000	0.60%

Minimum investment \$1,000,000. All family related accounts will be combined and prorated for fee calculation.

TEAM APPROACH



Our clients are at the core of all our decision-making.

Our team-based approach is rooted in collaboration to provide an enhanced client experience.

We leverage the diverse expertise and perspectives within our firm to deliver our best thinking and clear, coordinated guidance.



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Crestwood is an SEC registered investment adviser that maintains a principal place of business in the Commonwealth of Massachusetts. The Firm may only transact business in those states in which it is notice filed or qualifies for a corresponding exemption from such requirements. For additional information about Crestwood, please consult the Firm's Form ADV disclosure documents, the most recent versions of which are available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

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